

# Sizing Up

*Strategies for Staffing Emerging  
Community Foundations*



# The right staff mix

is vital to success. Finding the right people and funding their positions is easier said than done for emerging community foundations. The strongest embrace this challenge with creativity, flexibility and a future focus.

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More at [www.irvine.org/communityfoundations](http://www.irvine.org/communityfoundations)

### Additional staffing stories

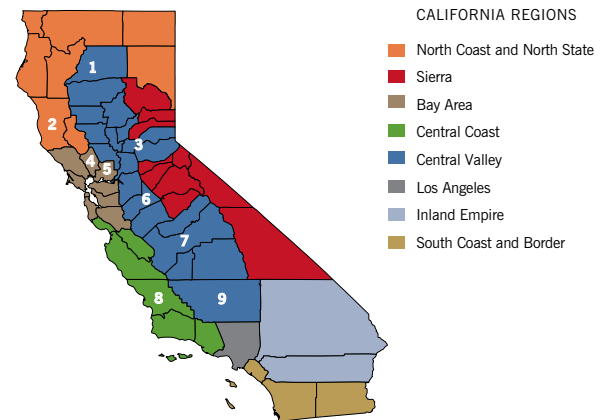
- A Conservative and Collaborative Approach to Staffing
- Flexibility in the Face of Unwanted Change and Unexpected Opportunity
- Slow Growth in a Resource-Constrained Environment
- Staffing for Community Knowledge as a Growth Driver

### Video on staffing strategies

### Customizable tools

## PROJECT PARTICIPANTS

The content in this paper has been developed through the experiences of a group of participants in The James Irvine Foundation *Community Foundations Initiative II*.



### Community Foundations Initiative II Sites

- 1 Shasta Regional Community Foundation  
*Redding, California*
- 2 The Community Foundation of Mendocino County  
*Ukiah, California*
- 3 Placer Community Foundation  
*Auburn, California*
- 4 Napa Valley Community Foundation  
*Napa, California*
- 5 Solano Community Foundation  
*Fairfield, California*
- 6 Stanislaus Community Foundation  
*Modesto, California*
- 7 Fresno Regional Foundation  
*Fresno, California*
- 8 San Luis Obispo County Community Foundation  
*San Luis Obispo, California*
- 9 Kern Community Foundation  
*Bakersfield, California*

### Additional Inputs

Leaders of the following community foundations and associations vetted this paper and contributed inputs prior to publication.

- Barry Community Foundation (MI)
- Blue Mountain Community Foundation (WA)
- Community Foundation for Palm Beach and Martin Counties (FL)
- Community Foundation of Bloomington and Monroe County (IN)
- Community Foundation of Broward (FL)
- Community Foundation of South Jersey (NJ)
- Grand Haven Area Community Foundation (MI)
- Greater Everett Community Foundation (WA)
- Iowa Council of Foundations
- La Crosse Community Foundation (WI)
- Parkersburg Area Community Foundation (WV)

# Foreword

It is rare that a community foundation believes it has sufficient resources to create the positive impact it envisions for its community. For small community foundations, this frustration is often amplified. These organizations face important needs and potential opportunities with few staff members to do the work.

From 2005 to 2011, The James Irvine Foundation invested \$12 million to support the growth of a set of emerging community foundations in rural and under-resourced regions of California through our *Community Foundations Initiative II*. We found that one of the most delicate challenges these community foundations face is how best to structure their staff to achieve their ambitions while simultaneously controlling their operating budgets for financial stability.

This group of young and rapidly growing organizations explored a variety of ways to both serve and grow when constrained by limited resources. We believe their insights, ideas and stories can serve as examples for how emerging community foundations across California and beyond might tackle the seeming conundrum of how to have community impact with just a few staff members.

We share this report with our thanks to each participating community foundation, and to the consultants at Sutherland~Edwards for their research and thoughtful coaching to cohort members. We hope these community foundations' careful and sometimes innovative approaches to staffing offer ideas and inspiration for colleague organizations determined to make the most of their people in service to their communities.



**James E. Canales**

President and Chief Executive Officer  
The James Irvine Foundation  
April 2012

# Context

## Community Foundations Initiative II

The James Irvine Foundation launched its *Community Foundations Initiative II* in 2005. This six-year effort involved a \$12 million investment to accelerate the growth and leadership of a set of small and young community foundations in rural areas of California. The initiative provided three types of support:

- Direct grants for core operating support and self-identified projects to build infrastructure
- Regranting funds for Youth or Arts programs to help develop grantmaking capability
- A strong program of technical assistance as well as a learning community to help community foundations gain from each other's successes and challenges; this included twice-yearly convenings of board and staff leaders from all participating community foundations

The cohort of seven community foundations participating in the initiative between 2005 and 2011 grew their collective assets 12 percent annually (going from \$73 million to \$131 million), compared to 7 percent for their peer group nationally. They increased their collective annual grantmaking by about \$4 million over this period (not counting Irvine regrant dollars). And they have made important progress as leaders who initiate action to address unmet needs in their communities.

## COMMUNITY FOUNDATIONS SERIES

This initiative has generated a significant body of knowledge that can benefit the larger field of community foundations, and that holds particular relevance for the youngest and smallest members of the field. This information is captured and shared through the Irvine Community Foundations Series.

2007



**Growing Smarter**  
Achieving Sustainability in Emerging Community Foundations

2011



**The Four Ps of Marketing**  
A Road Map to Greater Visibility for Community Foundations

2011



**Reaching Out**  
Board Ambassadors for Growth in Community Foundations

2012



**On Board**  
Engaging the Full Potential of Community Foundation Directors

2012



**Learning to Lead**  
The Journey to Community Leadership for Emerging Community Foundations

2012



**Sizing Up**  
Strategies for Staffing Emerging Community Foundations

Visit [www.irvine.org/communityfoundations](http://www.irvine.org/communityfoundations) to download these publications, view videos, read additional case studies and access customizable tools.

# Introduction: The Human Factor

Demand exceeds supply early in the life of growing community foundations. To thrive, each needs human resources to advance asset development, manage finances, provide investment expertise, deliver donor services and conduct grantmaking. Yet, most emerging members of the field struggle to staff all or even some of these functions.

The experiences of participants in the *Community Foundations Initiative II* offer a range of helpful examples for surviving the “scrappy stage,” as described by one chief executive. These foundations adopted a diversity of models, most based on unique organizational orientations and value propositions. All were constrained by scarce operating resources and shared similar intents, seeking ways to demonstrate the relevance of their community foundations while:

- Maximizing reach and visibility in their communities
- Engaging donors and growing assets
- Applying limited discretionary grantmaking dollars for the greatest benefit

This report presents a set of lessons learned through the experiences of these community foundations, as well as case studies that illustrate approaches to the challenge of staffing for future growth in an environment of scarcity.



staff·ing, v.

*The identification of essential job responsibilities and positions. The selection, training and development of human resources.*

# Staffing Matters: Seven Lessons

Like any startup organization, newer or smaller community foundations are especially dependent on the quality of staff to get a foothold on success. Equally important is the quality of initial decision making regarding organizational design. While the first move, establishing an executive director position, is a given, identifying what jobs are most needed next can limit or unleash the potential of a nascent community foundation.

It is worthwhile to wrestle with this issue. The experience of a set of emerging community foundations in rural and mid-size urban areas in California indicates that there is no single path to follow, as circumstances and strategic directions vary considerably. However, there are principles that can help any community foundation do more through its human resources.

## 1

### **Find the smartest, most talented people you can, and pay them as well as you can.**

Young community foundations feel the strain of limited resources in every aspect of their operations. However, acting from a mindset of scarcity can hinder growth. High-performing community foundations learned early the value of buying the best talent they could, even if it meant paying more than they had planned.

In the words of Fresno Regional Foundation CEO Dan DeSantis, “Nonprofits look at leadership as an expense. For-profits look at leadership and attracting talent as an investment. Don’t be afraid to invest in talent and pay what you need to get it. You have to demand productivity and excellence and get a return on your investment. But, if you invest wisely, they are worth every single penny!”

One immutable feature of San Luis Obispo County Community Foundation’s strategic plan was its priority on attracting, compensating and retaining the high-quality staff for which it had become known. Even when confronted with economic reversal in the recession, the board and chief executive stuck to this commitment.

## 2

### **Don’t be afraid to hire the best available talent, and design jobs around individuals’ strengths.**

When there are few people and a big scope of organizational needs, each staffer will probably wear multiple hats. Defining jobs around the abilities and interests of capable people can be a smart way to grow. For example, a program officer may have marketing savvy. Or two exceptionally qualified part-time finance professionals may bring more talent to a foundation than could ever be captured in a full-time position.

Of course, organizational leaders need to make sure that the mix of assignments covers all essential tasks, and that working with individual strengths and preferences does not leave important responsibilities uncovered. Perhaps most importantly, all positions and people in the organization need to be a direct fit with the community foundation’s strategy and future direction.



## 3

**Invest in staffing ahead of growth.**

Many small foundations are tempted to “staff up” only when growth is realized. Experience suggests this may be the wrong strategy.

Community foundations that were the most successful “over-invested” in staffing, relative to asset size, preparing for growth ahead of the curve rather than catching up later. Emerging community foundations should ask: When do we staff up? And what opportunity costs are lost by not staffing up early enough?

Each community foundation has to decide for itself how to be cutting-edge without being at the bleeding edge when it comes to investing in growth. Napa Valley Community Foundation President Terence Mulligan shares, “We staffed up quite intentionally in order to be the ‘knowledge masters of the community’ and to be super responsive to donors and their needs. It worked.”

Barry VanderKelen, Executive Director of the San Luis Obispo County Community Foundation observes, “Irvine funding allowed us to act as if we were bigger and more established than we were. Because of that, we now have a real estate foundation and we are generating healthy revenue from it. We have a gift annuity license. With seed capital, we did act ‘as if,’ and it allowed us to build a reputation for excellence. The trailing effect of that early capital is fantastic.”

## 4

**Resist silos.**

Larger community foundations may struggle for years to undo walls that creep up between departments over time. Smaller community foundations do not have the luxury of staffing separately for each function — and therefore have a natural advantage when it comes to integrating key activities such as donor services and grantmaking.

As with private sector startups, small operations can achieve high performance, but this requires staff flexibility, communication and cross-training. Meeting these requirements is doable. Kerry Caranci, who was Shasta Regional Community Foundation Interim Executive Director, says, “We all know what needs to be done, and we all know how to do each others’ jobs if necessary. Filling in for one another is never a problem.”

## 5

**Gain capacity by outsourcing where possible.**

Engaging an independent contractor as a chief financial officer, off-loading back office functions, retaining a local marketer to support visibility activities — these are all ways that community foundations can achieve efficiencies and make the most of limited in-house staff.

Going outside for help is typical at every growth stage of a community foundation, and is especially important for younger organizations that aren’t ready to staff in all key competency areas. *Community Foundations Initiative II* participants outsourced their fiscal operations more than they did any other single function. Two of these community foundations have outsourced their entire back office accounting duties, including fund administration and financial reporting, and they view this move as essential to their growth strategy.

6

**Beware the danger of waiting too long to invest in dedicated donor development staff.**

In the early years, a chief executive is also the community foundation's chief development officer. Indeed, he or she will always be the foundation's lead development staff. However, almost without exception *Community Foundations Initiative II* participants report that they waited too long to invest in additional fund development staff.

The move to add a position — whether it was configured as a gifts officer, a vice president of asset development or something else — was welcomed when it finally happened. These community foundations indicated that deferring the addition of staff dedicated to attracting new monies caused them to miss significant growth opportunities.

7

**Don't assume that traditional staffing and growth models work today.**

Assessing staffing models can be greatly informed by understanding typical community foundation lifecycles, as well as the differences between organizational approaches. For example, a community foundation focused on building endowment is likely to have distinctive program and development staff roles compared to one driven by donor advised funds.

One nontraditional staffing model involves Kern Community Foundation's move to establish one of its early staff positions with a focus on nonprofit outreach and community knowledge as a way to attract donors. Jeff Pickering, a community foundation veteran and now CEO of the Kern Community Foundation says, "I think you need to get comfortable with the ideas expressed in *On the Brink*<sup>1</sup> — that for more than 90 years the field operated in one way and in the last 10 years so many of the games have changed. No one bows at us when they walk in the door of the community foundation. We have to fight every day for what we do. The older generation has a respect for us as an institution, but for the next generation there's no connection to institutional deference. Let go of assumptions and try something new even if it is risky."

**Staffing and the Community Foundation Board**

Apart from selecting and compensating the best possible chief executive they could find, it is noteworthy that few of the *Community Foundations Initiative II* participant boards engaged in personnel and staffing configuration decisions. Boards did, however, focus on the retention of key staff and creating an organizational culture that provides intrinsic and extrinsic rewards. Boards should carefully monitor for burn-out, especially at the chief executive level, given the multiple demands and potential for "death by opportunity" experienced by nearly every emerging community foundation staff leader.

"The board looks to me to make sure resources are best spent," says Veronica Blake, CEO of the Placer Community Foundation. "They don't meddle too much in the model. They know we have really good people, that we work really hard and that we won't embarrass them."

<sup>1</sup> *On the Brink of New Promise: The Future of U.S. Community Foundations* was written by Lucy Bernholz, Katherine Fulton and Gabriel Kasper, and published in 2005 by Blueprint Research & Design, Inc. and Monitor Company Group, LLP.





### What's the right mix?

Staffing models shift as community foundation assets grow. The data in this table show how 43 community foundations across the United States are covering basic functions in terms of full-time equivalent (FTE) employees.

#### Staffing Models Shift as Community Foundation Assets Grow.

AVERAGE FTES AND ALLOCATION BY FUNCTION

ASSET RANGE	NUMBER OF ORGANIZATIONS	TOTAL	FINANCE	ADMINISTRATIVE	TECHNOLOGY	DONOR RELATIONS	COMMUNICATIONS	DEVELOPMENT	PROGRAM	SPECIAL INITIATIVES
\$20M–\$40M	23	4.7	0.9	1.0	0.04	0.5	0.2	0.7	1.0	0.3
\$40M–\$75M	20	8.0	1.4	1.7	0.2	0.5	0.8	0.9	1.9	0.5

SOURCE: CF INSIGHTS DATABASE, 2011

### Considering job descriptions, and sequencing new positions

Emerging community foundations have different approaches to creating job or position descriptions. Some develop very clear, even narrowly defined, descriptions and seek to hire an individual with precisely the qualifications sought. Others are more fluid, using briefer or more openly defined descriptions. These community foundations prefer flexibility as they assess candidates and consider individual qualifications — as well as special skills and interests — that may surface in the recruitment process.

There is one noteworthy element common to all community foundations being reported on here. Once they brought on a new hire, they soon found that the job description was out of date. The presence of an added staffer bringing new capabilities combined with the realities of organizational needs on a daily basis led to deployment of time that differed from the originally defined position description. So when adding their second, third and fourth positions, community foundations should expect that they will have people working beyond and across the parameters of stated job duties.

There is a particular magic in having, in one person, knowledge of the community as well as knowledge of the donor. At the end of the day, that's essentially the job description of the community foundation.

*Terence Mulligan, CEO  
Napa Valley Community Foundation*

Related, community foundations make different choices in determining what types of positions to add early in their evolution. From the outset, every community foundation needs a chief executive (often titled a President or Executive Director). As assets under management grow, a staff person with expertise in finance will be needed. But this may or may not be a full-time position. Plus, it may or may not be combined with any number of other functions needed by the community foundation. Based on the skills and personality of the person hired, a finance job might be blended with one or more other responsibilities such as scholarship and grants management, professional advisor outreach or donor services. Next, most likely will be the addition of a program staff person to manage grantmaking, whether donor advised, regranting from other sources or from discretionary assets secured by the foundation.

Because of all of these variables, there is no textbook approach for growing staff and creating job descriptions. Each community foundation must carefully assess its particular needs and take stock of its operating philosophy, then make decisions on which positions to add, and on how to craft the job descriptions that best meet those needs.

# Staffing Models: Three Stories

Distinct philosophies and circumstances shape the staffing strategies of community foundations. The breadth of configurations, and criteria for decision making, are wide. The following case studies illustrate the human resource approaches developed by a set of emerging members of the field. Note that staffing figures referenced are based on calendar 2011 status..



## **TAKING RISKS TO DEFY EXPECTATIONS** NAPA VALLEY COMMUNITY FOUNDATION

This community foundation staffed to go to a new level of discretionary grantmaking before grantmaking dollars existed.



## **BOLDNESS AND IMPROVISATION AT WORK** FRESNO REGIONAL FOUNDATION

This community foundation expanded its capabilities by tailoring job descriptions to match the special talents and strengths of hires too good to pass up.



## **PATIENCE AND DISCIPLINE MATCHED TO AN ENDOWMENT STRATEGY** PLACER COMMUNITY FOUNDATION

This community foundation pursued donor bequests and professional advisor referrals with a very lean staff and hands-on help from board members.



View these additional stories online at [www.irvine.org/communityfoundations](http://www.irvine.org/communityfoundations):

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## TAKING RISKS TO DEFY EXPECTATIONS

### NAPA VALLEY COMMUNITY FOUNDATION

This community foundation staffed to go to a new level of discretionary grantmaking before grantmaking dollars existed.



Since 1994, [Napa Valley Community Foundation](#) has served as a bridge between donors and nonprofit agencies, with a stated purpose of “bringing people, ideas and resources together to enhance the quality of life in the Napa Valley community.”

With modest assets under \$20 million, the Community Foundation has also distributed nearly \$20 million in grants and currently serves as the philanthropic partner to 100 individuals, families and nonprofit organizations. Napa Valley Community Foundation employs six staff in 5.5 full-time equivalent positions.

The Community Foundation experienced relatively slow growth and community presence until 2005, when the board recruited a new CEO from a senior position inside a successful, much larger community foundation.

CEO Terence Mulligan’s highest priority upon arrival was to get the Community Foundation’s financial house in order, in his words, “to get the financials to zero room for error.” He intentionally “over-hired” relative to the organization’s assets and resources in selecting a former CPA as the chief financial officer in 2005. His rationale: bolster the financial stature and credibility of the organization. “As things stood when I got here, I simply did not have enough good information and management tools to know how we were doing financially. We were in total turnaround mode on that front,” he says.

Also in 2005, the Napa Valley Community Foundation anticipated that it would be successful in securing Irvine Foundation seed funding. On the basis of that hope, the Community Foundation created a new position that would be funded with as-yet unsecured capital. The position was conceived as a hybrid, partly donor services and partly

program, even though the organization had no discretionary money. Mulligan knew that if the Community Foundation was able to land the Irvine grant, it would receive some dollars for regranteeing. He sought a candidate with the interpersonal skills needed to handle the personalities and interests of donors, and with the studiousness and analytical inclination to learn how to be an effective grantmaker.

The decision to go out on a limb and create a position and department not yet funded paid off. “Over time, grantmaking has become our leading edge because we had the talent,” says Mulligan. “We’ve built grantmaking capacity opportunistically, as we found donor interests we could connect to when our grantmaking resources were spread really thin.”

**The fundamental value proposition is that we know what’s going on in the community and that we make smart decisions about how to invest limited resources in specific needs in this community. That allows us to shape the message to donors that you should want to work *through* us because we are well informed, and you should give *to* us because it costs money to be as smart as we are about nonprofits and civic life in our region.**

*Terence Mulligan, CEO  
Napa Valley Community Foundation*



Today, Napa Valley Community Foundation has competitive grantmaking in seven separate funds. “It is a ton of work. We do about 100 discretionary grants a year for a current total of about \$600,000 to \$700,000,” says Mulligan. “In managing that volume, we became aware that we needed another staff person to help, and that’s when we added a manager of philanthropic services to share the load with the vice president for philanthropic services. And, as small as we are, pretty soon we’ll need to add again because there is so much activity and volume on both fronts.”

Napa Valley Community Foundation made another against-the-grain decision along the way. For several years, it maintained a traditional front desk position responsible for incoming calls, filing and processing forms. Staff concluded that scarce dollars were too valuable to allocate to such a static and relatively low-level position. Defying conventional wisdom that a donor must encounter a live person on the other end of the phone, the Community Foundation switched to an automated system and redeployed the cost of a “front desk.” With the resources saved, the Community Foundation was able to invest in a grants manager with responsibility for knowledge management who represents a greater value to donors.

“Most people don’t understand what a community foundation is, except that because of our name, we must give away money,” says Mulligan. “So grantmaking is our most effective tool for asset development. And the work you do with donors is enriched by the work you do with your discretionary grant budget. You have to have discretionary dollars to learn smart grantmaking lessons, so you can be a better resource to donors.”

Napa Valley Community Foundation has grown tremendously in discretionary dollars, visibility and influence. It has also taken on significant risk. In doing so, it has adopted an unconventional business model. According to Mulligan, “We’re totally overstaffed. I know that compared to any community foundation of our size, we have 1.5 or 2.0 full-time equivalent positions more than we should. But my board has my back on that. The fundamental value proposition is that we know what’s

going on and that we make smart decisions about how to invest limited resources in specific needs in this community. That allows us to shape the message to donors that you should want to work *through* us because we are well informed, and you should give *to* us because it costs money to be as smart as we are about nonprofits and civic life in our region.”

With a discretionary grant pool of \$600,000 to \$700,000 annually, the Community Foundation is now able to attract additional donor contributions of \$200,000 to \$400,000 each year on projects it identifies — a true gauge of successful donor engagement. “As with the merchandising software they use at Amazon, we get better at understanding what our donors might like the more often they say yes or no to an idea we bring them,” says Mulligan.

“If we ever get to a place where we have \$100 million in assets, which is what we probably ought to be one day in Napa Valley, I hope that we’ll still have the same staffing model we do now,” says Mulligan. “We’ve been fortunate to score well on donor perception reports, and I think having blended staff positions is one reason why. Program, that’s our product. But, we are only in this business because of our devotion to our donors and their diverse agendas. And we only have discretionary dollars because we ask our donors for them. Neglect your donor relationships at your own peril. Be faithful to them.”

#### NAPA VALLEY COMMUNITY FOUNDATION CURRENT STAFFING CONFIGURATION

A 17-YEAR-OLD ORGANIZATION APPROACHING \$20 MILLION IN ASSETS

1.0	FTE	CEO
0.8	FTE	CFO
1.0	FTE	VICE PRESIDENT FOR PHILANTHROPIC SERVICES (HYBRID DONOR SERVICES/PROGRAM OFFICER ROLE)
0.75	FTE	MANAGER OF PHILANTHROPIC SERVICES
1.0	FTE	GRANTS ADMINISTRATOR
1.0	FTE	DEVELOPMENT ASSOCIATE

**5.5 FTEs TOTAL**

## BOLDNESS AND IMPROVISATION AT WORK

### FRESNO REGIONAL FOUNDATION

This community foundation expanded its capabilities by tailoring job descriptions to match the special talents and strengths of hires too good to pass up.



[Fresno Regional Foundation](#) was created as a trust in 1966 and converted to a public charity in 1995. It is often described as a 45-year-old startup: Having underperformed for many years, it has experienced a rebirth since 2005. Today, the Foundation holds just shy of \$50 million in assets, and made \$4.8 million in total grants in 2010.

In 2005, with assets stalled at approximately \$10 million, the Foundation hired a new CEO and secured capacity-building funds from the Irvine Foundation. Fresno Regional Foundation has the same number of staff today, but the faces and configuration are dramatically different.

With the exception of the financial manager, who has served the Foundation for close to 20 years, no one on staff six years ago has remained. Gone are two positions providing technical assistance to local nonprofit organizations, replaced first by one, and then two, program officers. A new director of administration also functions as the chief finance officer and information management system director. This mix reflects the Foundation's biggest staffing lesson: "Everything we've done has been based on the abilities of the people we hired," says CEO Dan DeSantis.

#### FRESNO REGIONAL FOUNDATION CURRENT STAFFING CONFIGURATION

A 45-YEAR-OLD ORGANIZATION WITH RAPID RECENT GROWTH  
AND \$50 MILLION IN ASSETS

1.0	FTE	CEO
1.0	FTE	DIRECTOR OF ADMINISTRATION
1.0	FTE	SENIOR PROGRAM OFFICER
1.0	FTE	FOUNDATION SPECIALIST (PROVIDING ADMINISTRATIVE SUPPORT)
0.8	FTE	FINANCIAL MANAGER

**4.8 FTEs TOTAL**

**We hire good people, and we mix and match their talents. It's been more organic than intentional.**

*Dan DeSantis, CEO  
Fresno Regional Foundation*

A recruiting process surfaced the current director of administration, who has extensive financial and operations background from the private sector. It was immediately apparent "how much she could do for us beyond the job description," recalls DeSantis. It was equally evident that the Foundation would not be able to hire her for the salary offered. The Foundation did not hesitate to immediately increase its planned salary by more than 30 percent to attract her. It also swiftly revised the position description to encompass the additional responsibilities for which she was uniquely qualified.

When hiring a first program officer, the experience was quite different. Within a year, it became obvious that the employment relationship was a poor fit. The next time around, the Foundation found an individual with deep community roots and transferable skills from the nonprofit sector, but who had no familiarity whatsoever with community foundations. This presented no impediment as the Foundation jumped at the opportunity to add talent. According to DeSantis, the new program officer "exploded into the role" and, once up to speed, transformed the Foundation's community presence.

"When we hire, we look for what a candidate's skills are. At one point, we hired a program officer who loved marketing, and we ran with that. When she left, we moved that function under the director of administration," says DeSantis. "We hire good people, and we mix and match their talents. It's been more organic than intentional."



## PATIENCE AND DISCIPLINE MATCHED TO AN ENDOWMENT STRATEGY

### PLACER COMMUNITY FOUNDATION

This community foundation pursued donor bequests and professional advisor referrals with a very lean staff and hands-on help from board members.

Nestled in the Sierra Nevada foothills, [Placer Community Foundation](#) converted in 2005 from a private foundation established by a handful of donors to benefit a single town. Since the conversion, the Community Foundation has patiently and doggedly pursued an endowment strategy, cultivating planned, permanent gifts that will in time create a significant corpus forever for Placer County.

The organization's choice to adopt a bequest model rather than seek to grow assets with current gifts from living donors has serious staffing implications. Planned gifts typically have a long time horizon, and the Community Foundation has resigned itself to the minimal staffing permitted by limited fee revenue until legacy gifts arrive.

With current assets of \$8 million, the Community Foundation has three individuals on staff who together are equivalent to 2.6 full-time employees.

CEO Veronica Blake's job description includes serving as chief development officer and heading the organization's considerable community leadership work. In an unusual twist, this position also has primary responsibility for the Community Foundation's grantmaking initiatives. Blake also co-leads marketing communications with the part-time philanthropic services manager. The philanthropic services manager is chiefly focused on communications with professional advisors and donors, and has secondary involvement in grantmaking initiatives.

A full-time office manager supports a high volume of administrative work. From conversion until 2011, Placer Community Foundation operated with 2.2 FTEs, a total that included the office manager in a part-time role.



Where we have really advanced our work is supplanting staff with human resources from the board.

*Veronica Blake, CEO  
Placer Community Foundation*

The Community Foundation's goal of creating endowment drives it to invest heavily in marketing as a strategy and as a core function — and this absorbs a disproportionate share of time. Staff focuses great attention on frequent media releases, publications and website updates. "Making ourselves look a lot larger than we really are became so important," says CEO Veronica Blake. The Community Foundation's primary audience is professional advisors, from whom it seeks referrals to high net worth prospects. Communications are created to help project an image of strength and stability to advisors and their clients.

Placer Community Foundation struggled with finding and keeping a qualified finance staff person. In 2011, after repeated turnover and failing to secure the technical skills needed locally, the Community Foundation opted to handle this function through Greater Kansas City Community Foundation's *Greater Horizons* subsidiary. This has been a sound business decision from the Community Foundation's perspective — providing a competent resource to handle many finance needs as well as support complex gift transactions such as donations of real estate.

Despite this outsourcing of finance duties, the volume of work faced by the organization exceeds the reach of its paid staff positions. Blake says, “The laundry list of things to get done is always a mile long. We cope, but it’s a lot. And, we need to focus even more than we are on asset development. I had hoped the philanthropic services manager would be able to shift more into that work, but this is a part-time position and there are just not enough hours in the day to do it all.”

Lack of a dedicated program staff person, in a full- or even part-time capacity, is a limiting factor that might seriously hamper the CEO’s ability to drive asset growth.

Placer Community Foundation sees its board as the answer to the challenges of a small staffing model.

“Where we have really advanced our work is supplanting staff work with human resources from the board,” says Blake. “In asset development in particular, our board has taken on a lot of the load — spending countless hours working on a specific prospect, and enormous amounts of time relating to professional advisors. I have leaned on my board and they have added tremendous value. Until you have the confidence that you can support a bigger operating budget, supplant staff wherever it is reasonable with the board.”

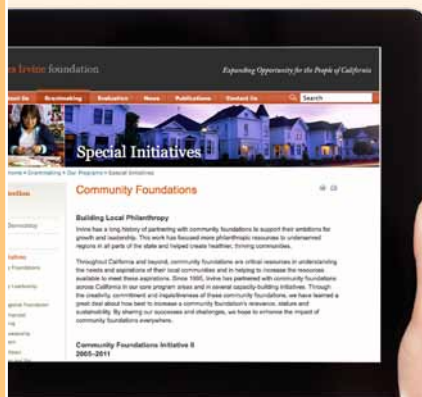
Blake says, “The skill sets of the people hired must evolve as the foundation grows. You have to hire people who understand that what they are doing today will not be the same as what is expected of them next month or next year.”

The board and CEO are resolute in their commitment to the endowment strategy, and accepting of its current staffing implications. According to Blake, “When you are only 2.6 FTEs and were 2.2 FTEs until this year, you’re sacrificing everything. I may not be here when the work I am doing now pays off. We are working on a lot of gifts that are 20 years or further out. But we have a long-term strategy in mind.”

#### PLACER COMMUNITY FOUNDATION CURRENT STAFFING CONFIGURATION

A 6-YEAR-OLD ORGANIZATION WITH \$8 MILLION IN ASSETS

1.0	FTE	CEO
0.6	FTE	PHILANTHROPIC SERVICES MANAGER
1.0	FTE	OFFICE MANAGER
<b>2.6</b>	<b>FTEs</b>	<b>TOTAL</b>



#### Looking for more stories?

Visit [www.irvine.org/communityfoundations](http://www.irvine.org/communityfoundations) for other real-life examples of staffing approaches used by emerging community foundations.

A Conservative and Collaborative Approach to Staffing

Flexibility in the Face of Unwanted Change and Unexpected Opportunity

Slow Growth in a Resource-Constrained Environment

Staffing for Community Knowledge as a Growth Driver

Plus, you can view a video and download customizable tools to advance your staffing strategy.

# Tools for Smart Staffing

The following resources can be helpful to emerging community foundations as they consider staffing approaches and candidates.

A thumbnail image of a document titled "STAFFING DISCUSSION GUIDE". It features several sections with headings and lines for text entry, organized into a structured layout.

## STAFFING DISCUSSION GUIDE

Start with these questions as prompts as you facilitate a dialogue on your community foundation's staffing philosophy and future staffing model.

A thumbnail image of a document titled "NEW HIRE CHECKLIST". It contains a list of items with checkboxes, organized into a structured layout.

## NEW HIRE CHECKLIST

Use this checklist to help select candidates uniquely qualified to work for an emerging community foundation.

A thumbnail image of a document titled "EXECUTIVE HIRE CRITERIA". It features a list of criteria with checkboxes, organized into a structured layout.

## EXECUTIVE HIRE CRITERIA

If your community foundation is searching for new executive leadership, consider this checklist of desirable personal characteristics, professional skills and prior experience.

Note that blank, editable versions of these tools (Microsoft Word®) are available at [www.irvine.org/communityfoundations](http://www.irvine.org/communityfoundations).

## Staffing Discussion Guide

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## REFLECTING ON THE PAST

1. How did we make our most recent decision to grow our staff?
2. Why was it the right moment (or not), and what were our key considerations?
3. What are the strengths and limits of our current approach to staffing (including opportunity costs)?

Strengths:

Limits:

## TAKING STOCK TODAY

4. How do we know whether our staffing model is working today?
- Indicators:
5. What new question(s) should we ask ourselves related to staffing?

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FOCUSING ON THE FUTURE					
6. Is it important to staff up now to support future asset growth or to staff more conservatively to reflect current assets?	STAFF FIRST			ASSET FIRST	
	1	2	3	4	5
7. How comfortable are we with investing in our growth and the risk this involves?	VERY COMFORTABLE			VERY UNCOMFORTABLE	
	1	2	3	4	5
<p>8. What alternative staff sizes and/or configurations should we consider?</p> <p>Ideas:</p>					
<p>9. If not now, when should we move to our next level or model in staffing?</p> <p>Right timing:</p> <p>Why?</p>					

## New Hire Checklist

The following questions can help you evaluate the merits of a specific candidate for a staff position within your emerging community foundation.

1.	<p>Does the candidate exhibit the flexibility we will need, and the ability to adapt and play new and different roles as this organization grows and changes?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Potential interview questions: Have you changed roles and responsibilities in the course of any jobs you have held? Are there ways you have added to your organization's success that went beyond your job description?</p>
2.	<p>Does the candidate bring additional or unique skills and talents that could expand the current position or advance the community foundation in some way?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>This item can be informed by a review of the candidate's resume and through an interview query such as: If you were in this job, what other hats might you be able to wear in our dynamic and growing organization? Are there other skills, experiences or interests you would bring to us?</p>
3.	<p>Have we fully explored this candidate's ability to manage the workload and stress levels typical in an emerging organization?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Potential interview questions: How comfortable and confident are you when dealing with multiple priority needs with competing deadlines? What work situations are stressful for you?</p>
4.	<p>Does this candidate have experience and/or enthusiasm related to working in a fast-paced, highly collaborative environment?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Potential interview questions: Can you work quickly and effectively? Are there examples that illustrate your ability to do so? How do you think about collaboration, and how much does it matter to you?</p>
5.	<p>What motivates this candidate? Does he or she demonstrate a passion for the work of the community foundation and a desire to improve our community?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Potential interview questions: What are you personally looking for from your next job? How do you think about and describe this community? How have you been involved in community?</p>
Comments related or in addition to responses to the questions above:	

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## Executive Hire Criteria

PAGE 1 OF 2

Community foundations seeking new executive leadership have a lot to consider. This checklist drawn from the first cohort of The James Irvine Foundation *Community Foundations Initiative* remains relevant today. *What Does It Take? Attributes of Effective Community Foundations Chief Executives* is the full report from which this checklist is excerpted. Find it at [www.irvine.org/communityfoundations](http://www.irvine.org/communityfoundations).

PERSONAL CHARACTERISTICS
<input type="radio"/> <b>Committed:</b> an abiding belief in the public good and a passion for community
<input type="radio"/> <b>Confident:</b> a faith in self and abilities as well as a positive outlook
<input type="radio"/> <b>Creative:</b> possessing an attentive mind, finding solutions to problems and better ways to achieve results
<input type="radio"/> <b>Empowering:</b> a habit of sharing information and authority, enabling and encouraging, and directing the spotlight onto the community organizations, donors, staff and others
<input type="radio"/> <b>Inclusive:</b> a genuine desire to involve others, seek out different opinions and ensure that all affected parties are engaged in decision making; the ability to work with people of diverse perspectives and backgrounds (age, race/ethnicity, gender, occupation, etc.) and an open communication style
<input type="radio"/> <b>Inspirational:</b> the ability to affect others in a positive way, translating individual belief into enthusiastic action by many
<input type="radio"/> <b>Integrity:</b> a sincere and trustworthy nature with high standards for honesty and fairness and desire for accountability
<input type="radio"/> <b>Intelligent:</b> a keen intellect and powers of reason, perception and understanding
<input type="radio"/> <b>Productive:</b> self-motivated, energetic, organized and focused on outputs
<input type="radio"/> <b>Quality mindset:</b> able to recognize the importance of details and to set high standards for the work of the community foundation
<input type="radio"/> <b>Unflappable:</b> able to respond to surprises with calm analysis, to keep many balls in the air at once and to operate well under stress

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Executive Hire Criteria *continued...*

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## PROFESSIONAL SKILLS

- ☐ **Board sense:** able to work well with a volunteer board of trustees, demonstrating understanding of the relationship between a chief executive and board, providing gentle leadership, and helping the board improve its ability to move the community foundation forward
- ☐ **Communications:** a good listener and clear, persuasive presenter in one-on-one or large group settings; excellent written and oral abilities; media savvy
- ☐ **Management:** able to direct staff, oversee operations, build and administer budgets, and assess and address infrastructure requirements especially related to technology
- ☐ **Facilitation:** capable of convening others, diffusing emotionally charged situations and helping divergent factions find common ground
- ☐ **Financial acumen:** able to understand and work with highly specialized community foundation planned giving, investment and accounting practices
- ☐ **Relationship building:** able to understand and connect with others, including staff, donors, nonprofit organization leaders, community leaders, and members of the community at large, as well as attract talent, form coalitions and mobilize action
- ☐ **Political savvy:** sensitive to shifts in the community and its political landscape, demonstrating dexterity to maneuver through this landscape
- ☐ **Strategic thinking:** ability to assess situations and opportunities, and develop appropriate goals and strategies

## DESIRABLE PRIOR EXPERIENCE

- ☐ **Executive responsibility:** senior management position and accountability, preferably in an organization with multiple, varied components
- ☐ **Nonprofit sector know-how:** leadership experience in a nonprofit entity as a staff executive or board officer
- ☐ **Program development:** hands-on experience creating and implementing community programs
- ☐ **Fundraising:** active involvement in financial development campaigns

## INSIGHT COMMUNITY FOUNDATIONS SERIES: SIZING UP

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### THE JAMES IRVINE FOUNDATION

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575 MARKET STREET  
SUITE 3400  
SAN FRANCISCO, CA 94105  
415.777.2244

---

865 SOUTH FIGUEROA  
SUITE 1320  
LOS ANGELES, CA 90017  
213.236.0552

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[WWW.IRVINE.ORG](http://WWW.IRVINE.ORG)

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